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## Greece

## Canned Deciduous Fruit

## Semi -Annual

## 2000

Approved by:

**Clay Hamilton**

**U.S. Embassy Greece**

Prepared by:

Stamatis Sekliziotis

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**Report Highlights:** Favorable weather conditions in 1999 resulted in bumper crops of peaches, but due to large stocks on hand, coupled with currently low prices, indications are that processors will not handle more than 250,000 mt in the year 2000. Exports of canned peaches during CY1999 totaled 259,622 MT (Exports to the U.S. totaled 2,505 MT). Imports of canned peaches from the U.S. total 8 mt with over 1,500 mt coming almost entirely other EU countries. Withdrawals in 2000 are expected to be 180,000 mt

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Includes PSD changes: Yes

Includes Trade Matrix: Yes

Annual Report

Athens [GR1], GR

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**Section I: Situation and Outlook - Narrative****CANNED PEACHES****Production**

Favorable weather conditions in 1999 resulted in bumper crops of peaches and nectarines. The 2000 weather conditions through June were about normal but fruit size, however, was relatively small because of a heavy set. This, combined with very high July temperatures which resulted in ripening a week earlier than expected, adversely affected the first three early varieties of cling peaches which were either left on the tree or were taken to the withdrawal pools. Later varieties had generally quality good fruit. A number of factories started processing early, but as of early August they had not gone into full production. Due to large stocks on hand, coupled with the low prices quoted at present, all indications suggest that processors will not handle more than 250,000 M.T. Present production forecasts with comparisons with the prior two years are as follows:

	1998	1999	2000
M e t r i c T o n s			
Peaches			
Clingstone	272,000	668,000	580,000
Freestone	139,000	305,000	270,000
Total Peaches	411,000	973,000	850,000
Nectarines	52,000	136,000	130,000

Although it is still too early for an accurate analysis of the total year 2000 utilization, present estimates of the peach crop (with comparisons to the prior year) are as follows:

	1999	2000
	M e t r i c T o n s	
Processed for Canned Peaches	356,000	250,000
Processed for Other products (puree – diced – frozen)	70,000	90,000
Fresh Domestic Consumption	200,000	200,000
Fresh Exports	65,000	80,000
Total Marketed Peaches	691,000	620,000
Withdrawals *	203,000	180,000
Weather damaged (estimate)	50,000	25,000
Farm Use & Waste	29,000	25,000
Total	973,000	850,000

\* The maximum allowable withdrawal quantity of peaches within the EU countries was not to exceed 40 percent of the total marketed tonnage in 1999 and this was further reduced to 30 percent for the 2000 season (approximately 193,000 mt). This is in line with EU Reg. No 2200/96 of October 28, 1996, which established the gradual reduction of quantities to be withdrawn.

The quality of the packed products this past season was good with a total of 27 factories that canned peaches in the 1999 season, the same number as in the prior two seasons. The minimum price to growers in 1999 based on EU Reg No1275/99 of June 17, 1999 was set at 28,368 EURO/100 kgs net. The 2000 minimum price to growers, based on EU Reg. No 1237/2000 of June 14, 2000, was set at the same level. This price, at the present rate of exchange of 337 drachmas per 1 EURO, and taking into account the processing aid (set by the same regulation) of 4.134 EURO/ 100 kgs net (fruit plus syrup), establishes the final price that processors have to pay at about 76 drachmas/kg (\$0.28/kg). The comparable price for the previous season was about 65 drachmas (\$0.22/kg)

## Consumption

The annual domestic consumption of canned peaches, excluding quantities used in the production of canned fruit mixtures, confection, and other purposes, is estimated at close to 6,000 MT. The annual consumption of canned peaches is influenced to some degree by the availability of fresh fruit, prices, and the severity of winter weather. It should be noted that, in the case of peaches, the domestic consumption figures shown in the PS&D table include quantities of diced peaches used in the production of canned mixtures. Over 80 percent of the domestic consumption is offered in retail sizes with the balance marketed in institutional can sizes of 3 kgs (A9 and A10) and 5 kgs (A12) cans.

## Stocks

Industry sources suggest that stocks of canned peaches on June 30, 2000 totaled about 120,000 MT due to the large 1999 pack. As indicated in past reports, actual stock data for canned deciduous fruits are AgoOffice estimates as official data are not available from any source. Practically all stocks on hand are of an exportable quality in consumer size cans.

## Trade

Exports of canned peaches during CY1999 totaled 259,622 MT (MY 1999 estimated at 317,500 mt) based on preliminary data available from the National Statistical Service (which is the only source carrying such figures). Exports to the U.S. in 1999 totaled 2,505 M.T. Comparable figures for CY 1998 were revised to 241,733 MT (MY 1999 estimated at 255,000 mt) for total exports and 632 MT exported to the U.S. The comparable CY 1997 figures were 268,728 MT and 2,860 MT respectively. Sales of the 1999 production of canned peaches through the end of June totaled about 70 percent of production, most of which has already been shipped. As shown in the following table, the actual ex-factory 1999 prices for canned peaches started at appreciably higher levels and dropped considerably as the season progressed. The choice grade from the 1999 pack has been practically sold out and only standard quality is on hand.

Canned Peaches	Mid. Aug. 1999	Jan. – Feb. 2000
In 24/1 kg cans	Dollars per case	
Choice	13.60-16.40	13.15-15.65
Good Standard	12.50-13.50	11.70-13.50
Standard	11.60-13.30	10.60-12.15

At present, prices that buyers of fresh peaches are willing to pay are quite depressed and range from about \$9.60 to \$9.80 for choice, \$8.00 to \$8.75 for good standard, and \$7.20 to \$8.00 for standard per 24/1kg case (a box of 24 cans weighing 1 kg each). As a result of the high stock levels and reasonable 2000 crop, processors at present are not eager to commit themselves to further purchases. The volume of canned peaches imported during CY 1999 totaled 1,545 MT compared to 1,935 MT the prior year. Only 8 MT came from the U.S. in 1999 while over 87 percent came from other EU countries.

## **Policy**

With respect to peaches, the GOG continues to implement policies based on EU guidelines, especially EU Reg. No 2200/96 of Oct. 28, 1996 which established the gradual reduction of the quantities to be withdrawn. As of Jan. 1, 1999 the quantities of peaches and nectarines withdrawn were set at no more than 40 percent of the fruit marketed by the groups of growers. This percentage was further lowered to 30 percent as of Jan. 1, 2000 and will be further lowered to 10 percent as of Jan. 1, 2002. Total quantity of fruit marketed is calculated for this regulation as total fruit sold in the domestic market (fresh or for processing) plus total fruit exported. The withdrawal price for 2000 is set at 12.45 EURO per 100 kgs net. Based on EU Reg. No 931/2000 of May 4, 2000, the EU-wide threshold levels for peaches and nectarines for the 2000/01 marketing period were adjusted to 238,200 for peaches and 83,200 MT for nectarines, down from 254,700 and 83,700 MT respectively compared to the previous year.

The quantity of peaches withdrawn during the 1999 season totaled 203,000 MT compared to 2,600 MT in 1998. The very small withdrawal in the 1998 season is attributed to the very short crop. Withdrawal prices set by the same regulation for the year 1997/98 and onward were covered in detail in our annual report GR-7031 of Sept. 15, 1997. The minimum price to growers for fruit delivered to processors this season is given in the production section of this report.

The EU quota for total EU canned peach production for 2000 remained unchanged at 582,000 MT net (fruit plus syrup). The processing aid to packers for the 2000 processing season was reduced to 4.134 EURO per 100 kgs net (fruit plus syrup) as per EU Reg. No 1237/2000 of June 14, 2000. This represents an actual reduction of over 32 percent from the 1999 level of 6,103 EURO. Peaches packed in water are not covered by the EU processing aid and thus the volume produced of such product continues to be negligible.

Interest rates quoted at present by the Agricultural Bank of Greece for short and medium term loans to processors/ exporters are 13.25 and 14.00 percent respectively. These rates which became effective as of July 1, 2000 may be further lowered by up to 3 additional percentage points depending on the customer's rating. The present rate of inflation runs at about 2.7 percent as compared to about 2.5 percent in the prior year.

There are no export subsidies for canned peaches. A recent decision of the Ministry of Agriculture sets the procedures and terms for the organization and functioning of interprofessional organizations. Represented in these organizations are groups dealing with production processing, marketing, standardization and distribution of agricultural products. The principle function of these organizations is to recommend measures to be taken for achieving better financial results. While membership is not compulsory, the incentive to join the group farming organizations comes from their consolidated marketing and training, uniformity in products, and beneficial treatment from the EU.

The custom tariff rates for imports from third countries including the US, have been lowered as of July 1, 2000 and are at present shown in the following table, as compared with those in effect on July 1, 1999.

Common Custom Tariff Code	Custom Rate – Percent ad Valorem	
	As of July 1, 1999	As of July 1, 2000
20087061	20.0	19.2
20087069	18.3	17.6
20087071	20.0	19.2
20087079	18.3	17.6
20087092	15.8	15.2
20087094	19.2	18.4
20087099	19.2	18.4

The value added tax continues to be levied at the 8 percent rate.

No changes in import regulations have taken place in recent years and further details can be found in the 1994 report. The special rebate to cover part of the cost of sugar in the case of exports to third countries, established by EU Reg. No 426/86, continues to be in effect. This special rebate is continuously adjusted. As of early August 2000, the rebate stands at 36.24 EURO per 100 kgs of sugar, provided this sugar is imported. This corresponds to 122.16 drs/kg (\$0.323/kg).

## CANNED FRUIT MIXTURES

### Production

Although it is too early for more than a preliminary forecast for the 2000 year, production is not expected to exceed 8,000 MT. The production of canned fruit mixtures during 1998 has been revised upward to 9,300 MT while that of 1999 was revised to 9,100 MT. In the 1998 revision was made in order to include packs containing over 50 percent of tropical fruit in production figures since the export/import data provided by NSS (the only source that carries such data) could not be justified without some adjustment in production.

As usual, over 95 percent of the canned fruit mixtures are in consumer size packs of ½ kg and 1 kg cans, with the balance in 3 kgs (A9 and A10) cans. The volume of canned diced peaches utilized by processors in the 1998/99 and 1999/2000 seasons for the production of fruit mixtures is estimated at 5,000 and 4,900 MT (fruit plus syrup) respectively. The corresponding volume of fresh pears was about 4,500 MT each year. There were again only three plants that processed fruit mixtures in 1999. The minimum price paid to growers for Williams and Rocha pears to be used in processing (as set by EU Reg. No 1285/2000 of June 19,2000) remained the same as last year at 35.552 EURO per 100 kgs net.

### Trade

Exports of canned mixtures during CY 1998 and CY 1999 totaled 7,959 and 8,929 MT respectively as shown in the matrices. Eight MT were exported to the U.S. during 1999. As usual, the EU continued to absorb about 90 percent of the Greek canned mixtures. The ex-factory export prices for good standard and standard quality product for the 1999 pack ranged from 30 to 40 DM (\$15.30 to \$21.90) per 24/1kg case with the majority sold at about 34 DM (\$18.60) per case. As footnoted in the 1998 trade matrix, it has been deemed advisable to begin as of that year to report canned mixture trade data that also include packs containing over 50 percent of tropical fruit. Imports of canned mixtures during the CY 1998 and CY 1999 totaled 1,421 and 1,312 MT respectively. Two tons were imported from the US during 1999, while the balance came for all practical purposes from EU countries.

## **Policy**

The peach and pear portions of canned fruit mixtures, which account for about 80 percent of the pack (peaches 45% and pears 35%) are covered by EU price policies (i.e. minimum grower prices, processing aid and withdrawal prices). With regards to peaches, this information is covered in detail in the canned peach section of this report, while minimum grower price for Williams and Rocha pears are covered in the production section for canned fruit mixtures. The processing aid for the final product, pear portion plus syrup, is 11.348 EURO per 100 kgs net for this 2000/01 campaign. This was lowered under EU Reg. No 1285/2000 of June 19, 2000, and reflects a drop of 4.5 percent compared to a year earlier. The EU quota for total EU production of canned William and Rocha pears for this 2000/01 season remained unchanged at 102,805 MT net (fruit plus syrup). Like peaches, pears packed in water are not covered by the EU processing aid and thus the volume of such products produced this past season is negligible if any.

The 1999/2000 withdrawal prices (July 1999 through August 2000) as set by the above mentioned regulation was 9.46 EUROS/100 kgs net and will be further lowered for the 2000/01 period to 9.10 EUROS per 100 kgs net. The withdrawal prices for pears for this 2000 season have been set by EU Reg. No 2200/96 of Oct. 28, 1996 and are covered in detail in the report GR-7031 of Sept. 15, 1997. The amount of pears withdrawn during 1999/2000 is negligible.

The customs tariffs for canned mixtures imported from third countries, including the U.S., have been lowered as of July, 1,2000 and are shown in a separate table under "statistical tables" of this report. Import regulations, as well as sugar rebates for exported canned mixtures, are identical to those covered in the canned peaches section of this report.

The exchange rate of EUROS to drachmas for 1999 averaged about 325 drachmas per 1 EURO while at present (mid-August) stands at about 337 drachmas per 1 EURO. The corresponding exchange rate of drachmas to dollar at present stands at about 372 drachmas per \$1.00 U.S.

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## **CANNED APRICOTS**



## **Production**

The 2000 apricot production is estimated at about 80,000 MT due to the favorable weather conditions (77,000 MT in 1999). Although the apricot crop was considerably large and the quality satisfactory year 2000 deliveries of apricots to processors are not expected to exceed 15,000 MT which is the amount suitable for canning due to the wide spread of the sharka virus. Yields for canned apricots obtained in 1999 averaged about 16.88 kgs of fresh apricots per 24/1kg cans/case compared to 15.49 kgs in 1998. There were only 5 plants that processed apricots in syrup/juice or water in 1999 the same number as the prior year. The average price that the processors paid to growers during this 2000 season ranged between 50 and 80 drs/kg (\$0.18 to \$ 0.23/kg). An additional 20 drs/kg (\$0.06/kg) for transportation, loading and unloading had to be paid by processors since the processing plants are located in Northern Greece apricot production is centered basically in Peloponesos (southern Greece). The final price during 1999, including the cost of fruit plus transportation and handling, ranged between 90 and 110 drs/kg (\$0.29 and \$0.36/kg).

## **Trade**

Exports of canned apricots during CY 1999 totaled 10,653 MT, down somewhat from the 13,535 MT exported during the prior calendar year. There were no exports to the U.S. in 1999 and none in 1998. As usual, over 90 percent of canned apricots were exported to EU countries. Export ex-factory prices for canned peeled apricots during the 1999/ 2000 year were given in the report GR-9023 of Sept. 17, 1999. The 2000 ex-factory prices presently quoted for 2000 packed fruit are as follows:

	Dollars per 24/1 kg cans/case
Choice	\$ 12.10 – 12.30
Good Standard	\$11.15-11.60
Standard	\$10.25-10.70

Imports of canned apricots continue to be low. Total CY 1999 imports amounted to only 194 MT as compared to the revised figure of 653 MT for the prior year. The EU continues to be by far the principal supplier.

**Policy**

Canned apricots, as mentioned in past reports, are not covered by EU policies (minimum price to growers and processing aid to packers). Only withdrawal prices are established by the EU. The withdrawal price for apricots for this 2000 season has been set by EU Reg. No 2200/96 of Oct. 28, 1996 and is 16.06 EUROS per 100 kgs net as compared to 17.01 EUROS of a year earlier. This reflects a drop of about 5 percent. The quantities withdrawn during the 1999 season totaled about 9,200 MT. It is still too early to predict the level of withdrawal this season.

The customs tariff rates for canned apricots imported from third countries, including the U.S., have been lowered as of July 1, 2000 and are shown in a separate table in the statistical information section of this report. Import regulations, as well as sugar rebate for canned apricots exported, are identical to those covered under "Canned Peaches".

**Exchange Rates**

1998	\$1.00 U.S. = 294.30 Drachmas
1999	\$1.00 U.S. = 305.85 Drachmas
Jan. – Sept. 2000	\$1.00 U.S. = 356.36 Drachmas

## Section II: Statistical Information

### PS&D Tables, Canned Peaches

PSD Table						
Country	Greece					
Commodity	Canned Peaches				(MT)(MT, Net Weight)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		07/1998		07/1999		07/2000
Deliv. To Processors	223200	223200	300000	356000	0	250000
Beginning Stocks	1506	1506	3000	5506	64000	120000
Production	267000	267000	420000	441000	0	320000
Imports	3000	2500	1000	1500	0	1000
TOTAL SUPPLY	271506	271006	424000	448006	64000	441000
Exports	260000	255000	350000	317500	0	300000
Domestic Consumption	8506	10500	10000	10506	0	11000
Ending Stocks	3000	5506	64000	120000	0	130000
TOTAL DISTRIBUTION	271506	271006	424000	448006	0	441000

**Export Trade Matrix, Canned Peaches**

Export Trade Matrix			
Country	Greece		
Commodity	Canned Peaches		
Time period	CY	Units:	MT
Exports for:	1998		1999
U.S.	632	U.S.	2505
Others		Others	
France	15046	France	14024
Holland	13726	Holland	9051
Germany	68909	Germany	87608
Italy	53303	Italy	21185
U.K	44793	U.K.	26516
Austria	7241	Other EU	22078
Other EU	20563	>Sub Total EU	180462
>Sub Total EU	223581	Canada	11668
Canada	6669	Mexico	6617
Japan	4801	Brazil	11488
Total for Others	235051		210235
Others not Listed	6050		46882
Grand Total	241733		259622

This table replaces the one submitted with last year's report GR-9023 of Sept. 15, 1999 in order to take into account trade data supplied by the National Statistical Service, as of 1998, to include canned product packed without sugar (in juice or water as well as solid pack).

**Import Trade Matrix, Canned Peaches**

Import Trade Matrix			
Country	Greece		
Commodity	Canned Peaches		
Time period	CY	Units:	MT
Imports for:	1998		1999
U.S.	0	U.S.	8
Others		Others	
France	377	France	471
Germany	469	Germany	309
U.K	486	Italy	163
Italy	483	Other EU	426
Other EU	63	>Sub Total EU	1369
>Sub Total EU	1878	Brazil	91
Total for Others	1878		1460
Others not Listed	57		77
Grand Total	1935		1545

This table replaces the one submitted with last year's report GR-9023 of Sept. 15, 1999 in order to take into account trade data supplied by the National Statistical Service, as of 1998, to include canned product packed without sugar (in juice or water as well as solid pack).

**PS&D Tables, Canned Mixtures**

PSD Table						
Country	Greece					
Commodity	Canned Mixtures				(MT)(MT, Net Weight)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		07/1998		07/1999		07/2000
Deliv. To Processors	0	0	0	0	0	0
Beginning Stocks	143	143	543	1443	543	1143
Production	4500	9300	9000	9100	0	8000
Imports	500	1000	500	1300	0	1200
TOTAL SUPPLY	5143	10443	10043	11843	543	10343
Exports	3600	8000	8500	9500	0	8500
Domestic Consumption	1000	1000	1000	1200	0	1200
Ending Stocks	543	1443	543	1143	0	643
TOTAL DISTRIBUTION	5143	10443	10043	11843	0	10343

**Export Trade Matrix, Canned Mixtures**

Export Trade Matrix			
Country	Greece		
Commodity	Canned Mixtures		
Time period	CY	Units:	MT
Exports for:	1998		1999
U.S.		U.S.	8
Others		Others	
Germany	316	Germany	623
U.K.	2474	U.K.	3103
Belgium-Luxemb.	1458	Belgium-Luxemb	1181
Other EU	1296	Other EU	1612
>Sub Total	5544	>Sub Total EU	6519
Japan	1052	Japan	1187
Angola	499	Egypt	422
Total for Others	7095		8128
Others not Listed	864		793
Grand Total	7959		8929

This table replaces the one submitted with last year's report GR-9023 of Sept. 15, 1999 in order to take into account trade data supplied by the National Statistical Service, as of 1998, to include packs containing over 50 percent tropical fruits.

**Import Trade Matrix, Canned Mixtures**

Import Trade Matrix			
Country	Greece		
Commodity	Canned Mixtures		
Time period	CY	Units:	MT
Imports for:	1998		1999
U.S.		U.S.	2
Others		Others	
Germany	669	Germany	662
U.K.	508	U.K.	227
Other EU	207	Other EU	394
>Sub Total EU	1384	>Sub Total EU	1283
Thailand	31		
Total for Others	1415		1283
Others not Listed	6		27
Grand Total	1421		1312

This table replaces the one submitted with last year's report GR-9023 of Sept. 15, 1999 in order to take into account trade data supplied by the National Statistical Service, as of 1998, to include packs containing over 50 percent tropical fruits.



**Custom Tariff Rates for Canned Fruit Mixtures**

Common Custom Tariff Code	Custom Rate - Percent ad Valorem	
	As of July 1, 1999	As of July 1, 2000
20089251	12.8	11.0
20089259	18.3	17.6
20089272	9.9	8.5
20089274	14.2	13.6
20089276	14.0	12.0
20089278	20.0	19.2
20089292	13.4	11.5
20089293	19.2	18.4
20089294	13.4	11.5
20089296	19.2	18.4
20009297	13.4	11.5
20089298	19.2	18.4

**PS&D Tables, Canned Apricot**

PSD Table						
Country	Greece					
Commodity	Canned Apricots				(MT)(MT, Net Weight)	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		07/1998		07/1999		07/2000
Deliv. To Processors	6200	9200	12000	12000	0	15000
Beginning Stocks	1204	1204	304	204	904	704
Production	8200	12100	15600	14500	0	18000
Imports	300	500	200	200	0	200
TOTAL SUPPLY	9704	13804	16104	14904	904	18904
Exports	8200	12500	14000	13000	0	16000
Domestic Consumption	1200	1100	1200	1200	0	1200
Ending Stocks	304	204	904	704	0	1704
TOTAL DISTRIBUTION	9704	13804	16104	14904	0	18904

**Export Trade Matrix, Canned Apricot**

Export Trade Matrix			
Country	Greece		
Commodity	Canned Apricots		
Time period	CY	Units:	MT
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
France	4595	France	3305
Germany	5296	Germany	4173
U.K.	887	U.K.	1035
Other EU	1847	Other EU	1092
>Sub Total EU	12625	>Sub Total EU	9605
Poland	111	Poland	233
Czechia	262	Czechia	343
Total for Others	12998		10181
Others not Listed	537		472
Grand Total	13535		10653

This table replaces the one submitted with last year's report GR-9023 of Sept. 15, 1999 in order to take into account trade data supplied by the National Statistical Service, as of 1998, to include canned product packed without sugar (in juice or water as well as solid pack).

**Import Trade Matrix, Canned Apricot**

Import Trade Matrix			
Country	Greece		
Commodity	Canned Apricots		
Time period	CY	Units:	MT
Imports for:	1998		1999
U.S.		U.S.	
Others		Others	
France	37	France	82
Spain	58	Spain	36
Other EU	27	Other EU	37
>Sub Total EU	122	>Sub Total EU	155
Turkey	510		
Total for Others	632		155
Others not Listed	21		39
Grand Total	653		194

This table replaces the one submitted with last year's report GR-9023 of Sept. 15, 1999 in order to take into account trade data supplied by the National Statistical Service, as of 1998, to include canned product packed without sugar (in juice or water as well as solid pack).



**Custom Tariff Rates for Canned Apricots**

Common Custom Tariff Code	Custom Rate – Percent ad Valorem	
	As of July 1, 1999	As of July 1, 2000
20085061	20.0	19.2
20085069	18.3	17.6
20085071	20.0	19.2
20085079	18.3	17.6
20085092	15.8	15.2
20085094	19.2	18.4
20085099	19.2	18.4